

rooms occupied. 8 rooms have been rented for 0 to 3 months
4 rooms have been rented for 4 to 6 months
1 room has been rented for 7 to 9 months
1 room has been rented for 10 to 12 months
10 rooms have been rented for 1 to 2 years
0 rooms have been rented for 2 to 3 years
0 rooms have been rented for 3 to 4 years
0 rooms have been rented for 4 to 5 years
0 room have been rented for 5 plus years.

- **TIME OCCUPIED %** -- The result of dividing the room count of the individual categories by the total room count of all categories.
For example: 8 rooms (in the 0 to 3 month category) is divided by 24 to arrive at 33.33%
- **MONTH FREE** -- Total rooms that had a month free given to them anywhere in the life of the contract.
- **MONTH FREE %** -- The result of dividing the room count of the individual categories who used the month free by the total room count in all categories that used a month free. In the example page above, month free was not used; so all fields have a zero balance.
- The last portion of SECTION III contains a total count and summary of all CUSTOMER TYPES.



[Click here to view instructions on report printing](#)

Reviewing unit price list



The UNIT PRICE LIST report provides you with the individual sizecodes and the current rental rate associated with the sizecode.

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The UNIT PRICE LIST BY SIZECODE report provides you with the individual sizecodes and their descriptions. In addition, it shows the square and cubic footage available in the room size. The last column provides the current monthly rental rate for this sizecode.

Unit Price List By Sizecode			
SIZECODE	DESCRIPTION	SQ/CU FT	RATE
5X5X8	1 SC-10 UPPER CLIMATE	25/200	\$39.95
5X10X8	1 SC-10 LOWER CLIMATE	50/400	\$69.95
5X10X8	1 SC-10 UPPER CLIMATE	50/400	\$64.95
5X15X8	1 SC-10 LOWER CLIMATE	75/600	\$89.95
8X12X7	1 VANBODY OUTSIDE NOCLIMATE	96/872	\$79.95
8X16X7	1 VANBODY OUTSIDE NOCLIMATE	128/896	\$94.95
8X20X7	1 VANBODY OUTSIDE NOCLIMATE	160/1120	\$106.95
8X40X7	1 VANBODY OUTSIDE NOCLIMATE	320/2240	\$131.95
10X10X8	1 SC-10 LOWER CLIMATE	100/800	\$109.95
10X10X8	1 SC-10 UPPER CLIMATE	100/800	\$104.95
10X15X8	1 SC-10 LOWER CLIMATE	150/1200	\$156.95
10X15X10	1 RV COVERED NOCLIMATE	15/150	\$44.95
10X15X25	1 RV COVERED NOCLIMATE	15/375	\$44.95
10X25X10	1 RV COVERED NOCLIMATE	25/250	\$69.95
10X30X25	1 RV COVERED NOCLIMATE	30/750	\$74.95
10X50X25	1 RV COVERED NOCLIMATE	50/1250	\$109.95

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[Click here to view instructions on report printing](#)

Reviewing walk around




The WALK AROUND provides you with a list of rooms in the order in which you walk the facility. A sequence number is assigned to each room. The application then takes this sequence number and sort room inventory from the lowest to the highest sequence number before displaying this report. The WALK AROUND report can be a useful tool. In order for this report to be useful, you must maintain walk around sequence for all rooms. This is done on the ROOM INVENTORY page.

Maintaining walk around sequence



To maintain your walk around sequence using the mouse:


1. Click on INVENTORY MENU on the HOME or MAIN MENU page.
2. Click on ROOM INVENTORY.
3. Click on the picture frame icon  next to the room you want to edit.



To main your walk around sequence using the keyboard:


1. Press TAB until the cursor is over INVENTORY MENU on the HOME or MAIN MENU page.



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2. Press ENTER.
3. Press TAB until the cursor is over ROOM INVENTORY.
4. Press ENTER.
5. Press TAB until the cursor is over the picture frame icon  next to the room you want to edit.
6. Press ENTER.

The WALK SEQ field is the only field you can edit on this page. Type the correct walk around sequence number for this room in this field and click

 or press ALT + S.













Room Inventory Worksheet	
Entity: 728025	Rate: \$186.95
ROOM: 0014	SIZECODES
WALK SEQ: 	8X20X7 VANBODY 1 OUTSIDE
EFF DATE: 1/23/2001	NOCLIMATE
STATUS: VACANT	

 (Access Key: B) (Access Key: S)

Complete the above process for all units, assigning each unit a unique number.

The DAILY WALK AROUND REPORT prints in ascending WALK # order. It provides you with a list of rooms, the status of each room, the customer currently occupying the room, and the move in and paid through dates of this customer.

Daily Walk Around Report For Entity 828059						
WALK #	ROOM	STATUS	CUSTOMER	MOVE IN THRU	ACCESS	NOTES
0	E107	OC	CUNNINGHAM, MELISSA	3/9/2001 4/2/2001	 - C	
1	E100	OC	VILLAGOMEZ, JUAN	8/23/2000 3/22/2001	 - C	
2	E101	OC	KEN, CLAY	9/8/2000 4/7/2001	 - C	
3	E102	OC	LINDSAY, KRISTA	3/20/1999 3/19/2001	 - C	
4	E103	OC	SWANSON, AUDREY	10/26/2000 3/25/2001	 - C	
5	E104	DEL	KRAEMER, NEFF	12/17/2000 1/16/2001	 - R	
6	E105	OC	MERSHEIMER, WALTER	2/12/2001 4/11/2001	 - C	
7	E106	OC	JESSICA, SPRINGER	5/29/2000 3/28/2001	 - C	
8	E108	DEL	STILES, RAYE	9/16/2000 2/15/2001	 - R	
10	E109	OC	RANDALL, RICHARD	2/13/2001 3/12/2001	 - C	
11	E110	OC	VINCE, LANGLEY	11/13/2000 4/12/2001	 - C	
12	E111	OC	MACHAB, JAMIE	2/19/2001 3/18/2001	 - C	

 - Lien  - Available  - Damaged  - Delinquent  - Customer Lock  - Keyed Lock

At the bottom of the WALK AROUND report you will find a template of

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what each lock color represents.

Use the WALK AROUND report to verify each room's status as you walk the facility each morning.



[Click here to view instructions on report printing](#)

Closing Process and Nightly Batch

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System Use



System use customer is a U-Haul entity that uses a room for U-Haul business.

Independent dealers are excluded from the SYSTEM USE designation. Dealers are business men and women who have a contractual agreement with U-Haul and are not part of the U-Haul corporate structure. Dealers who rent from U-Haul can be one of the other customer types depending on their relationship with U-Haul International.

To complete a contract for a system use customer, click **SYSTEM USE** radio button on the **CHOOSE A CUSTOMER TYPE** page.

Click



to continue.

Type the entity's six-digit number in the corresponding field.

Click



to continue.

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
Choose A Customer Type							
<input type="radio"/> Business							
<input type="radio"/> Corporate							
<input type="radio"/> Individual							
<input checked="" type="radio"/> System Use							
<div>(Access Key: B) (Access Key: X)</div>							

Customer	Contact	Access Users	Room	Gate Access	Payment Plan	Invoicing	Payment
System Use Information							
Entity Number: <input type="text"/>							
Type Entity To Be Charged. Click NEXT To Continue.							
<div>(Access Key: C) (Access Key: B) (Access Key: X)</div>							

All system use contracts require a contact person who is responsible for the room. This person's name and address must be entered on the **CUSTOMER INFORMATION** page. The remaining contract is identical to what has already been discussed. The only difference is when you take payment. The only option available is **SYSTEM USE**.

Go to the contract type to see instructions on completing the contract.

Appendix – Quick Reference

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Appendix – Quick Reference



This section provides a quick reference to various items used by the application.

State abbreviations

Sizecode information

Letter Template items -- Dealers

State Abbreviations

You are required to input the state abbreviations on several screens. The list below provides all fifty states and the Canadian provinces.



AL	- Alabama	ON	- Ontario
AK	- Alaska	OR	- Oregon
AB	- Alberta	PA	- Pennsylvania
AZ	- Arizona	PE	- Prince Edward Island
AR	- Arkansas	QU	- Quebec
BC	- British Columbia	RI	- Rhode Island
CA	- California	SS	- Saskatchewan
CO	- Colorado	SC	- South Carolina
CT	- Connecticut	SD	- South Dakota
DE	- Delaware	TN	- Tennessee
DC	- District of Columbia	TX	- Texas
FL	- Florida	UT	- Utah
GA	- Georgia	VT	- Vermont
HI	- Hawaii	VA	- Virginia
ID	- Idaho	WA	- Washington
IL	- Illinois	WV	- West Virginia
IN	- Indiana	WI	- Wisconsin
IA	- Iowa	WY	- Wyoming
KS	- Kansas	YK	- Yukon Territory
KY	- Kentucky		
LA	- Louisiana		
ME	- Maine		
MB	- Manitoba		
MD	- Maryland		
MA	- Massachusetts		
MI	- Michigan		
MN	- Minnesota		
MS	- Mississippi		
MO	- Missouri		
MT	- Montana		
NE	- Nebraska		
NV	- Nevada		
NF	- Newfoundland		
NK	- New Brunswick		
NH	- New Hampshire		
NJ	- New Jersey		
MN	- New Mexico		
NY	- New York		

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NC	- North Carolina
ND	- North Dakota
NW	- Northwest Territory
NS	- Nova Scotia
OH	- Ohio
OK	- Oklahoma

Sizecode information



A sizecode is a complete description of a particular room inventory product. A sizecode consist of the following individual specifications:

Width – the width of a room measured in feet.

Length – the length of the room measured in feet.

Height – the height of the room measured in feet.

Product – A description given this room to differentiate it from other rooms. Currently the product descriptions include:

Crate – a box or container.

Interior – a storage room that does not have an exterior wall.

Lockers – a locker-style storage space.

Office space – a room or rooms that can be used as offices.

Mini – a small storage space.

RV – a parking space for a recreational vehicle.

SC-10 – modular storage space – rooms are assembled into upper and lower rooms.

Van body – an old U-Haul truck van body that has been removed from the truck.

Warehouse – a large building or floor of a building that can be utilized as a large storage facility.

Floor – the location of the rooms that make up this sizecode. Floor can be 0 through 9. 0 is designated as basement.

Elevation – the specific position of the rooms

Inside – is not adjacent to any exterior walls

Covered – an outside storage space that has a protective roof.

Enclosed – an outside storage space that is enclosed with walls and a roof.

Lower – used in conjunction with the SC-10 models to designate modular rooms built at ground level.

Street – rooms that are found at street level.

Upper – used in conjunction with the SC-10 models to designate modular rooms built above the ground level rooms.

Outside – a room that has at least one exterior wall.

Climate – description of room's heating and/or cooling designation

NoClimate – no heating or cooling is done.

Climate – cooling is done in hallways.

Heated – heating is building.

AirCooled – cooling is done in building.

Access – Access to rooms specifically for storage facilities with more than ground-level storage.

Elev – an elevator is used to access this room's floor.

Stair – a staircase is used to access this room's floor.

Doors – the type of door used by this size room.

Rollup – a metal or wooden door that rolls up into the roof of the room.

Much like a garage door.

Swing – a metal or wooden door that swings out of the way when opened.

Chainlink – a door made of chain link fence material.

Metal – a metal door.

Bonus – a checkbox that enables you to assign a different rate to rooms of the same size. For example, you have ten 5 x 5 rooms. One of these rooms has a pillar in the middle of it. You want to give the customer renting this room a different rate. In order to do this, you would set up two sizecodes. All fields but the BONUS and RATES field would be the same for the two sizecodes. For the sizecode with the obstruction, you would check the BONUS checkbox and enter a different rate.

Comments – a space to type information about this unique sizecode.

Rate – the current rate you want to charge for this product.

Location, Mechanical, Obstruction, Shape, and Special – Additional description of the sizecode

Letter template items -- Dealers



Within the LETTER TEMPLATES page you find a list of items that refer to database fields. Each field provides information about your storage facility that can be used to create a customer letter. Below is a list of these elements and a short explanation of their meaning.

<<AuctionDate>> The date of a scheduled auction. This date is set up in the AUCTIONS functions found within the INVENTORY MENU.

<<AuctionProcTot>> This is the total amount collected from the sale of the customer's goods at auction. This amount must first be entered on the AUCTIONS page within the INVENTORY MENU.

<<CustAddress>> This is the customer's address including street address, city, state, and zip code.

<<CustomerLabel>> This is the customer's name and address including first and last name, street address, city, state, and zip code.

<<CustomerName>> This is the customer's first and last name.

<<InvoiceDate>> The invoicing date. Invoicing is controlled within the SITE BUSINESS RULES. Once established, it can be used within a

rental contract for customer's who want to receive an invoice billing notification letter.

- <<LastPayDate>> The date the customer last made payment on their rent.
- <<NewRateEffDate>> The date a new rate change will take effect.
- <<PayDueDate>> The date payment is due on a room.
- <<PayThruDate>> The date payment is paid through.
- <<TaxChngEffDate>> The date a tax rate change will take effect.
- <<TodayDate>> Today's date.
- <<fsDelPeriod>> First delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.
- <<fsDelRate>> First delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the first delinquency period.
- <<scDelPeriod>> Second delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.
- <<scDelRate>> Second delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the second delinquency period.
- <<thDelPeriod>> Third delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.
- <<thDelRate>> Third delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the third delinquency period.
- <<foDelPeriod>> Fourth delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.
- <<foDelRate>> Fourth delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the fourth delinquency period.
- <<ffDelPeriod>> Fifth delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.
- <<ffDelRate>> Fifth delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the fifth delinquency period.
- <<LienPeriod>> Lien period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

the number of days past the due date on a rental.

<<LienRate>> Lien fee. This is established on SITE BUSINESS RULES. It is the lien sale fee assessed when a customer reaches the lien period.

<<CenterCity>> Your business resides in this city.

<<CenterState>> Your business resides in this state.

<<CenterZip>> Your business resides within this zip code.

<<EntityLabel>> Your complete business name, address, and phone number.

<<EntityName>> Your complete business name.

<<Discounts>> The dollar amount of discounts included on a customer's rental contract. Discounts are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<DiscountsDue>> The dollar amount of discounts included in a customer's outstanding balance owed.

<<Fees>> The dollar amount of fees included on a customer's rental contract. Fees are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<FeesDue>> The dollar amount of outstanding fees not yet paid for by the customer.

<<Safestore>> The dollar amount of SAFESTOR charges included on a customer's rental contract. SAFESTOR charges are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<SafestoreDue>> The dollar amount of outstanding SAFESTOR charges not yet paid for by the customer.

<<Services>> The dollar amount of service charges included on a customer's rental contract. Service charges are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<ServicesDue>> The dollar amount of outstanding service charges not yet paid for by the customer.

Bold To display a block of text in darker, and wider black to make it stand out from the other text around it. Click on Bold, put the cursor between the and , and type the information you want to display in bold.

Center To center a block of text. Click Center, put the cursor between the <div align=center> and </div>, and type the information you want centered.

Italics To display a block of text in italics. Click Italics, put the cursor between the <i> and </i>, and type the information you want italicized.

Tab To indent a line. Click Tab. Start typing your text after this.

Underline To display a block of text with a line under it. Click Underline, put the cursor between the <u> and </u>, and type the information you want underlined.

<<CurrentRate>> The current rental rate of the customer's room including taxes.

<<NewRoomRate>> The new rate recently established, which will eventually replace the current rate. New rates are established on the RATES page. The period of time designation is defined on SITE BUSINESS RULES page. Both of these functions can be found within UHI MANAGEMENT.

<<RateChgReason>> The reason for this rate change. This reason can be found on the RATES page within UHI MANAGEMENT.

<<RentDue>> The rent that is currently owed by the customer.

<<RoomRate>> The current room rate without taxes.

<<ContractBal>> The balance of a customer's contract. This includes are rent, discounts, services, fees, etc. that are owed.

<<ContractCredit>> This is the amount of a customer's overpayment.

<<PayDueAmntBrk>> This is the payment due amount summary. It shows the total monthly rent, date of last payment, amount of last payment, the payment due date, the paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees, SAFESTOR, services, taxes and current balance.

<<InvoiceFee>> For invoicing customers, this shows the fee they are charged for this service. This fee is established on the SITE BUSINESS RULES page. Once established, it can be used within a contract.

<<LastPayAmnt>> The amount of payment last made on a customer's account.

<<LastPayAmntBrk>> An account summary which includes: The total monthly rent, date of last payment, amount of last payment, payment due date, paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees, SAFESTOR, services, taxes and

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current balance.

<<NextMonthsBal>> The amount owed in the next month.

<<NextMoNewBal>> The amount owed in the next month including all fees, services, rent, SAFESTOR, etc.

<<NrmlPayAmntBrk>> An account summary which includes: Monthly rent, date of last payment, amount of last payment, payment due date, paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees SAFESTOR, services, taxes and current balance.

<<OldRmNumber>> The old room number.

<<OverPayAmnt>> The overpayment amount.

<<RmNumber>> The current room number.

<<RoomBal>> The balance owed on the room.

<<CurrentTaxAmount>> The tax amount currently charged the customer.

<<CurrentTaxRate>> The tax rate currently in use.

<<NewTaxAmount>> The new tax amount.

<<NewTaxRate>> The new tax rate.

<<TaxesDue>> Taxes due by the customer.

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Independent Dealer Information



Because you are an independent dealer, you have more flexibility within the application than does a center or marketing company. You control the setting of your rates, what sizcodes you want to maintain, the services you want to provide, and complete control over your room inventory. For this reason, this page provides you with additional instructions.



Included on this page and on other pages in this guide you will find information on the following topics:

Home page views

Change my password

Inventory menu

Combined rooms

Adding sizcodes

Adding combined room

Linking rooms to a combined room

Unlinking rooms from a combined room

Deleting a room

Editing a room

Changing a room number

Changing walk around sequence

Changing room effective date, status, and sizcode

Site management menu

Storage messenger

Storage note pad

UHI management menu

Audit reports

Maintaining charges and discounts

Reporting of charges and discounts

Letter Maintenance

Adding a letter

Viewing a letter

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Home page view




Here is an example of the HOME page for an independent dealer. Notice there are several additional selections on this page that a center or marketing company would not see.

WebSelfStorage

- [Change My Password](#)
- [Inventory Menu](#)
- [Site Management Menu](#)
- [Storage Messenger](#)
- [Storage Note Pad](#)
- [UHF Management Menu](#)
- [U-Haul Dealer](#)
- [U-Haul GM](#)
- [Web CARD](#)
- [Room/Truck Equity Chart](#)

[Program Feedback](#)

[Alert This Site](#)



Log On
(Access Key 0)

New Customer

- [Move In](#)
- [Reservation](#)

Lookups

- [Report List](#)

Existing Customer

- [Take A Payment](#)
- [Move Out](#)
- [View Contract](#)
- [Transfer](#)
- [Authorized Access](#)

Current Customers


- [Open Contracts](#)

Here is an example of a counter person's HOME page. Notice several management features are missing from this page.

WebSelfStorage

- [Change My Password](#)
- [Inventory Menu](#)
- [Site Management Menu](#)
- [Storage Messenger](#)
- [Training](#)
- [Room/Truck Equity Chart](#)

[Program Feedback](#)



Log On



Additional security rights can be established as needed. If you need a new security level, contact the WebSelfStorage project team by using the FEEDBACK page. Tell us what specific functions you want the new security level to have. New rights can be established the same day as requested.

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Room Inventory



The ROOM INVENTORY page provides you with a few more options. Notice the icons to the left of each room number.

Room Inventory					
Entity: 990628			Date: 6/25/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
	101 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
	107 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
	108 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
Total Rooms: 8					

= Combine More Than One Room Under This Number. = Edit The Selected Room. = Delete The Selected Room.

(Access Key: B) (Access Key: A)

Combined Rooms



The paperclip icon enables you to combine two or more rooms into a new room number. This is a management tool that enables you to rent underutilized rooms at a more attractive price. Combining a room requires a number of steps.



Adding sizecode

Adding a room number

Combining a room.

Adding sizecodes



A combined room requires its own specific sizecode. Sizecodes are control from the UHI MANAGEMENT MENU.



To set up a new sizecode using the mouse:

1. Click on UHI MANAGEMENT MENU on the HOME page.
2. Click on SIZECODES on the UHI MANAGEMENT MENU.

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Example of UHI
MANAGEMENT
MENU for an
independent
dealer.

UHI Management Menu

Audit Reports
Chg/Disc Allocations
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Click On An Underlined Item To View

Sizecodes
(Access Key: B)

3. Click **Sizecodes** on the SIZECODE LIST FOR ENTITY page.

Example of the
SIZECODE
LIST FOR
ENTITY page

Sizecode List For Entity 990020

SIZE	PROD.	DESCRIPTION	DOOR	BONUS	#RMS	RATE
20X22	CRATE	5 COVERED	NOCLIMATE	METAL	0	\$12.00
5X5X7	SC-10	2 LOWER	CLIMATE	ELEV	ROLLUP	0 \$44.95
8X8X7	SC-10	1 LOWER	CLIMATE	ROLLUP		3 \$34.95
8X10X7	SC-10	1 LOWER	CLIMATE	ROLLUP		3 \$44.95

= Edit The Sizecode = Toggle Switch To Activate Or Deactivate A Sizecode



Sizecodes
(Access Key: B) **Sizecodes**
(Access Key: A)

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















This is an example of adding a combined room

- [illegible]



4. Type the *room number* in the ROOM field.
5. Type the *walk around sequence* in the WALK SEQ field.
6. Change effective date when necessary.
7. Change status when necessary. Status can only be VACANT or DAMAGED.
8. Click on the SIZECODE for this specific room.
9. Click .
10. Click  to return to the previous page.

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This is what
the ROOM
INVENTORY
page looks
like after the
room is
added.

Room Inventory					
Entity: 990828			Date: 5/29/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COMERMS	RATE
  	101 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	107 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
  	107-08 4X8X5	1 INSIDE CLIMATE	VACANT		\$42.95
  	108 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
Total Rooms: 9					

 = Combines More Than One Room Under This Number  = Edits The Selected Room  = Deletes The Selected Room



 (Access Key: B)  (Access Key: A)



Linking rooms to a combined room






11. Click on the paperclip icon  found next to the combined room number.

The
COMBINED
ROOM
WORKSHEET
page displays.
























Selected Room Information				
Entity: 990828			Date: 5/29/2001 4:46:02 PM	
ROOM #	SIZE	PRODUCT	DESCRIPTION	RATE
107-08	4X8X5	LOCKERS	1 INSIDE CLIMATE	\$42.95
Available/Combined Rooms				
AVAILABLE ROOMS			COMBINED ROOMS	
101 - 8X8X7 1 LOWER CLIMATE			107 - 4X4X5 1 INSIDE CLIMATE	
102 - 8X8X7 1 LOWER CLIMATE			108 - 4X4X5 1 INSIDE CLIMATE	
103 - 8X8X7 1 LOWER CLIMATE				
104 - 8X10X7 1 LOWER CLIMATE				
105 - 8X10X7 1 LOWER CLIMATE				
106 - 8X10X7 1 LOWER CLIMATE				
 (Access Key: A)			 (Access Key: R)	

 (Access Key: B)  (Access Key: S)

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12. Click on the first individual room under AVAILABLE ROOMS that makes up this combined room. This highlights the room.
13. Click  to move this room to the COMBINED ROOMS list.
14. Repeat step 2 and 3 for the remaining individual rooms that make up this combined room.
15. Click .
16. Click  to return to the ROOM INVENTORY page.

Notice room 107-08. In addition, notice that the individual rooms are no longer listed under ROOM. Now look at the COM RMS column on the right side of the page next to RATES. The individual rooms are now listed as attachment to the combined room.




Room Inventory						
Entity: 990028			Date: 5/29/2001			
	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE	
  	101 6X8X7	1 LOWER CLIMATE	VACANT		\$34.95	
  	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95	
  	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95	
  	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95	
  	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95	
  	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95	
 	107-08 4X8X5	1 INSIDE CLIMATE	VACANT	107, 108	\$42.95	
					Total Rooms: 7	
 = Combines More Than One Room Under This Number  = Edits The Selected Room  = Deletes The Selected Room						
<div>Access Key: B</div> <div>Access Key: A</div>						

Unlinking rooms from a combined rooms




Rooms linked to a combined room can be unlinked only when the combined room is in VACANT or DAMAGED status. When you unlink a combined room,






















To unlink rooms from a combined room:


17. Click on the paperclip icon  found next to the combined room number.
18. Click on a room found under COMBINED ROOMS.
19. Click . This moves the room back to the AVAILABLE ROOMS list.
20. Repeat steps 2 and 3 for all remaining rooms.
21. Click .

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22. Click  to return to the ROOM INVENTORY page.

Notice the two combined room (107 and 108) now display under the ROOM column.

Room Inventory					
Entity: 990029			Date: 6/08/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
 	101 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
 	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
 	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
 	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	107 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
 	107-08 4X8X5	1 INSIDE CLIMATE	VACANT		\$42.95
 	108 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
Total Rooms: 9					
 = Combines More Than One Room Under This Number  = Edit The Selected Room  = Delete The Selected Room					

 
 (Access Key: B) (Access Key: A)

Deleting a room




To avoid confusion, it is a good idea to delete a combined room from your active inventory after you have unlinked the individual rooms. In this way, inventory reporting remains accurate. Several reports, such as the facility utilization and unit mix report provide room counts and potential income. If you leave a combined room on inventory, these reports do not reflect true counts and totals.


Individual rooms can also be deleted at any time.

In both cases, the room being deleted must be in VACANT or DAMAGED status before you can delete it.

To delete a room from inventory:

1. Click on the flaming match icon  found next to the room number you want to delete.
































2. Click on  to complete the delete.

E-732

The room 107-08 was deleted from inventory. It no longer displays on the page.

If later you need to re-establish a deleted room number, simply add it back to your inventory and link the individual rooms to it.

Room Inventory					
Entity: 990020			Date: 6/08/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
  	101 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
  	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
  	107 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
  	108 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
Total Rooms: 8					
 = Combines More Than One Room Under This Number  = Edit The Selected Room  = Delete The Selected Room					


 (Access Key: B)  (Access Key: A)

Editing room inventory






A room in inventory may need to be edited to adjust the walk around sequence number, change the room number, change effective date or change its sizecode.

To edit room inventory:

1. Click the picture frame icon  found next to the room number you want to edit.

The ROOM INVENTORY WORKSHEET page displays.

Room Inventory Worksheet	
Entity: 990020	Rate: \$34.95
ROOM: <input type="text" value="107-08"/>	SIZECODES: <input type="text" value="4X4X5 LOCKER 1 INSIDE CLIMATE"/>
WALK SEQ: <input type="text" value="1"/>	<input type="text" value="4X4X5 LOCKER 1 INSIDE CLIMATE"/>
EFF DATE: <input type="text" value="6/1/2001"/>	<input type="text" value="5X8X7 SC-10 1 LOWER CLIMATE"/>
STATUS: <input type="text" value="VACANT"/>	<input type="text" value="8X10X7 SC-10 1 LOWER CLIMATE"/>
	
 (Access Key: B)  (Access Key: A)	

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Changing a room number



Occasionally, you may find it necessary to renumber rooms at your facility. *WebSelfStorage* enables you to capture room number changes easily.

To change room number:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Press INSERT to turn on the overtype feature.
3. Type the *new number* over the old.
4. Press INSERT to turn off the overtype feature.
5. Click

Note: If the room is rented, a ROOM NUMBER CHANGE letter is generated in the next nightly batch process.

Changing the walk around sequence



Walk around sequence is used by the DAILY WALK AROUND REPORT to provide you with information and enable you to easily track the status of each room at your facility. You control the order of this report by maintaining the WALK SEQ. on the ROOM INVENTORY WORKSHEET page.

Daily Walk Around Report For Entity 990020

The DAILY WALK AROUND REPORT can be found by clicking on REPORTS LIST on the HOME page.



To review information about this report click [here](#).

WALK#	ROOM	SIZE	STATUS	CUSTOMER	MOVEMENT	THRU	LOCK	NOTES
1	1011	8X12X7	VAC					
2	102	8X12X7	VAC					
3	103	8X12X7	VAC					
4	104	8X12X7	VAC					
5	105	8X12X7	VAC					
6	106	8X12X7	VAC					
7	107	4X4X5	VAC					
8	108	4X4X5	VAC					


= Lien = Available = Damaged = Delinquent = Customer Lock = Keyed Lock

(Access Key: B)

To change a room's walk around sequence:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Click in the WALK SEQ field, or press TAB until the cursor is in this field.

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3. Press INSERT to turn on the overtype feature.
4. Type the *new walk around sequence*.
5. Press INSERT again to turn off the overtype feature.
6. Click 

Changing effective date, status and sizecode



The EFFECTIVE DATE, STATUS and SIZECODES can also be changed on an existing room.

You may want to change the EFFECTIVE DATE when you make a room number change to keep track of the date this change was made.


STATUS can only be changed when a room is in VACANT or DAMAGED status.

When you change a room from VACANT to DAMAGED you remove it from the list of available rooms within a rental contract.

When you reactive the room by changing it from DAMAGED to VACANT you add the room back into the pool of available rental units.

If the dimensions of a room change, because of construction or modular re-design, you can give this room a new sizecode by first adding the sizecode to the application and then pointing the room to this new sizecode.

To change effective date:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Click in the EFFECTIVE DATE's month field.
3. Press INSERT to turn on the overtype feature.
4. Type the *new effective month*.
5. Press TAB.
6. Type the *new effective day*.
7. Press TAB.
8. Type the *new effective year*.
9. Click 

STATUS:




To change the status:

10. Go to the ROOM INVENTORY WORKSHEET page.
11. Click the down-arrow next to the list box entitled STATUS.
12. Click VACANT or DAMAGED to select.

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Save






















1. Go to the **ROOM INVENTORY WORKSHEET** page.
2. Scroll down the list of sizecodes.
3. Click on the new sizecode.
4. Click .

Facility: 990028 Rate: \$34.99	
ROOM: 101001 WALK SEQ: 15 EFF DATE: 05 / 05 / 2005 STATUS: DAMAGED	SIZES CODES 1000G LOCKERS 1 INSIDE CLIMATE 0000G LOCKERS 1 INSIDE CLIMATE 1000G SC-10 2 LOWER CLIMATE 0000G SC-10 2 LOWER CLIMATE 0000G SC-10 1 LOWER CLIMATE 0000G SC-10 1 LOWER CLIMATE

In the above example, the original room number was changed from 101 to 1011.
WALK SEQ was changed from 1 to 15.
EFF DATE was changed from 5/21/2001 to 5/30/2001.
STATUS was changed from VACANT to DAMAGED.
SIZECODE was changed from 8x8x7 SC-10 1 Lower Climate to 8x10x7 SC-10
1 Lower Climate


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Notice on the
ROOM
INVENTORY
page that room
1011 shows all
changes.


Room Inventory					
Entry: 990020			Date: 6/30/2001		
	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
 	1011 8X10X7	1 LOWER CLIMATE	DAMAGED		\$44.95
 	102 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
 	103 8X8X7	1 LOWER CLIMATE	VACANT		\$34.95
 	104 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	105 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	106 8X10X7	1 LOWER CLIMATE	VACANT		\$44.95
 	107 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
 	108 4X4X5	1 INSIDE CLIMATE	VACANT		\$24.95
Total Rooms: 6					
 = Combines More Than One Room Under This Number.  = Edits The Selected Room.  = Deletes The Selected Room.					
 (Access Key: B)		 (Access Key: A)			



The ROOM INVENTORY page display changes as you rent rooms.

The flaming match icon  does not display when the room is rented. This is done to prevent deleting an occupied room from inventory by mistake.

The paperclip icon  does not display when the room is rented. This is done to prevent unlinking individual rooms that are part of a combined room, which is occupied. It also prevents adding an individual room to a combined room when the individual room is rented.

The paperclip icon  does not display when the room is in damaged status. A damaged room should never be linked to a combined, rentable room for obvious reasons.



For security reasons, a counter person cannot complete most of the above functions. They only have access to changing walk around sequence. A counter person has the same rights as employees at U-Haul centers. To review what they can do, click [here](#).

Site Management

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UHI management menu



The UHI MANAGEMENT MENU is the core of this application.

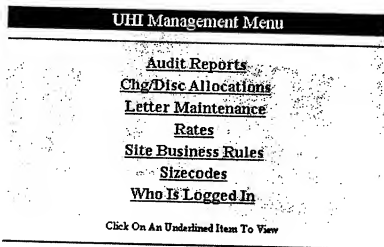
Several pages contain in this section enable you to set up business rules that control the way the application functions.

Other pages enable you to audit who is on the application as well as review historical transaction information.

The RATES selection enables you to establish new rates for the different sizecodes, as well as control when those rates will be applied.

The SIZECODES selection enables you to establish new sizecodes, edit existing sizecodes, and deactivate sizecodes.

To access this page, click UHI MANAGEMENT MENU on the left side of the HOME page.



5654
(Access Key: B)

Click on a linked item below to go to that part of the user's guide.



[Audit Reports](#)

[Chg/Disc Allocations](#)

[Letter Maintenance](#)

[Rates](#)

[Site Business Rules](#)

[Sizecodes](#)

[Who Is Logged In](#)

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Creating audit reports



The AUDIT REPORTS enables you to review transaction exceptions made. You can track waived fees, as well as general fee added to a contract.

In order to understand where these fees come from, we first look at a contract and discuss how the information gets to these reports.

General fees can be waived within a contract from the ACCOUNT LEDGER page by clicking on the yellow dot icon to the left of the fee.

Account Ledger										
Contract No: 990028-80000002				Customer: FRANKLIN JONES						
Show Me	Order			Show Rooms				Balance Due		
30 Days	Ascending			ALL				\$68.72		
PAID	DUE	THRU	ROOM DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE		
✓	5/30/2001	6/29/2001	102 RENT	\$34.95	1	\$0.77	\$35.72	\$35.72		
✓	5/30/2001	6/29/2001	102 CLEANING	\$25.00	1	\$0.00	\$25.00	\$25.00		
✓	5/30/2001	6/29/2001	102 DUMPSTER	\$20.00	1	\$0.00	\$20.00	\$20.00		
✓	5/30/2001	6/29/2001	102 SILVERBOX	\$18.00	1	\$0.00	\$18.00	\$18.00		
\$	5/30/2001		CASH				(\$36.72)	\$0.00		
✓	5/30/2001	6/29/2001	102 RENT	\$34.95	1	\$0.77	\$35.72	\$35.72		
	6/30/2001	7/29/2001	102 SAFESTOR	\$18.00	1	\$0.00	\$18.00	\$18.00		
●	5/31/2001		102 DELINQUENCY	\$15.00	1	\$0.00	\$15.00	\$15.00		
			FEES							

S = View Payment Detail ✓ = Paid In Full ● = Reversed Charge ○ = Waiver Selected Fee

(Access Key: F)

FRANK JONES

FRANK JONES

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A new record
is created on
the ACCOUNT
LEDGER
page.

Account Ledger									
Contract No: 990828-00000002					Customer: FRANKLIN JONES				
Show Me		Order		Show Rooms		Balance Due			
30 Days		Ascending		ALL		\$78.72			
PAID	DUE	THRU	ROOM DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE	
✓	5/00/2001	6/29/2001	182 RENT	\$34.95	1	\$0.77	\$35.72	\$35.72	
✓	5/00/2001	6/29/2001	182 CLEANING	\$25.00	1	\$0.00	\$25.00	\$60.72	
✓	5/00/2001	6/29/2001	182 DUMPSTER	\$20.00	1	\$0.00	\$20.00	\$80.72	
✓	5/00/2001	6/29/2001	182 SAFESTOR	\$18.00	1	\$0.00	\$18.00	\$98.72	
\$	5/00/2001		CASH				(\$98.72)	\$0.00	
✓	5/00/2001	6/29/2001	182 SAFESTOR	\$18.00	1	\$0.77	\$35.72	\$35.72	
	6/29/2001	7/29/2001	182 SAFESTOR	\$18.00	1	\$0.00	\$18.00	\$53.72	
⊖	5/31/2001		1ST STAGE DELINQUENCY FEE	\$15.00	1	\$0.00	\$15.00	\$68.72	
⊖	5/00/2001		1ST STAGE DELI (overdue)	(\$15.00)	1	\$0.00	(\$15.00)	\$53.72	
⊖	5/00/2001		CLEANED FEE FROM FLOOR OF STORAGE ROOM	\$25.00	1	\$0.00	\$25.00	\$28.72	

⊖ = View Payment Detail ✓ = Paid In Full ⊖ = Reversed Charge ⊖ = Waiver Selected Fee

Both waived
and added fees
are available
from the AUDIT
REPORTS
page. Get to
this page by
clicking on
AUDIT
REPORTS on
the UH
MANAGEMENT
MENU.

Audit Reports

Manual Fees

Waived Delinquency Fees

Click On An Underlined Item To View

(Access Key: B)

Click on either
MANUAL FEES
or WAIVED
DELINQUENCY
FEES.
The
REPORTING
DATE RANGE
page displays.
Type the range
of dates you
want to review.
The FROM and
the TO dates
can be the
same date. The

Reporting Date Range

From: 5 / 00 / 2001 To: 6 / 29 / 2001

Type Date Range Needed To Display Manual Fees Report

1881 1884

(Access Key: B) (Access Key: X)

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Maintaining charges and discounts

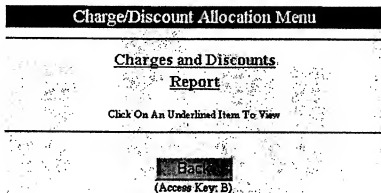


CHG/DISC ALLOCATIONS enables you to set up customer services that require a fee be taken from the customer. In addition, it enables you to set up customer discounts.

To get to the CHG/DISC ALLOCATIONS page:

1. Click on UHI MANAGEMENT MENU on the HOME page.
2. Click on CHG/DISC ALLOCATIONS on the UHI MANAGEMENT MENU page.

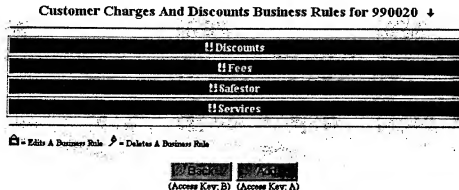
The CHARGE/
DISCOUNT
ALLOCATION
MENU has two
selections.
First we will
review the
CHARGES
AND
DISCOUNTS,
then we will
cover
REPORT.



Editing the charges and discounts page

3. Click on the CHARGES AND DISCOUNTS MENU

The
CUSTOMER
CHARGES
AND
DISCOUNTS
BUSINESS
RULE page is
similar to the
RENTAL
AGREEMENT
page within a
contract.



There are several icons used as hypertext links and to expand the page for viewing. These icons are discussed below:

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would be 25. This represents 25% of an amount.

If you enter a percentage in the RATE field, check the PERCENTAGE checkbox.

If you enter a dollar amount in the RATE field, DO NOT check the PERCENTAGE checkbox.

Apply rate to?:

Total Amount
One Month Only
Total Amount

To establish when the rate is applied, click the down-arrow next to APPLY RATE TO. Click on the selection you want.

- ONE MONTH ONLY means that the percentage is applied using first month rent only. If more than one rental charge is applied at the same time, only the percentage of the first month's rental charge is used to figure the percentage.
- TOTAL AMOUNT means that the percentage is calculated using the total rental charge. If the customer pays three months rental charge, the percentage calculation uses this total amount.

Frequency?:

Once Only
Continually
Once Only
Once Only

To establish how often this rate is applied, click on the down-arrow next to FREQUENCY. Click on the selection you want.

- CONTINUALLY means that it is applied each time a rental charge is applied. Safestor protection is an example of a charge set up using this frequency.
- ONCE ONLY means that once the charge is applied to a customer, it no longer is charged on any other contract the customer might complete. A customer administrative fee is an example. The charge is assessed the first time the customer does business with U-Haul. Once this charge is applied, the customer is never charged again.
- ONCE, BUT REUSEABLE means that the charge is applied at different occasions throughout the life of the contract. An example would be a cleaning fee. If the area around the customer's room needs to be cleaned, you may want to charge them for the labor and supplies. If after a time, the area again needs cleaning, you may want to apply these same charges again.

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AVAILABLE TO USE WITH THE PRODUCT TYPES CHECKED

Interior: ☒ Mini: ☒ SC-10: ☒ Lockers: ☒ Van Body: ☒
Crate: ☐ RV: ☒ Office Space: ☐ Warehouse: ☒

You control what rental products use this charge or discount. Check the box next to the products that could have this charge or discount applied when this product is rented.

AVAILABLE TO USE WITH THE CONTRACT TYPES CHECKED

Reservation: ☐ Move Ins: ☒ Payments: ☒ Transfers: ☒ Move Outs: ☒


You also control what types of contracts display this charge. For example: You may not want to add any charges to a RESERVATION contract, in which case you would leave this box unchecked.

MISCELLANEOUS INFORMATION

User Selectable?: ☒ Include on Audit Report?: ☒ Can It Be Reversed?: ☒
Non Payment Of These Charges Require Delinquency Fees Be Applied: ☐

Check the boxes that apply.

Miscellaneous information includes:

- USER SELECTABLE means you are able to select it from the list of services within the contract.
- INCLUDE ON AUDIT REPORT means anytime this charge is used, it is then available to review on the audit report.
- CAN IT BE REVERSED means that the waiver icon  is available so that the item can be reversed within a contract.
- NON PAYMENT OF THESE CHARGES REQUIRE DELINQUENCY FEES BE APPLIED means that if this fee is not paid, the customer becomes delinquent and late fees are applied when required.

AVAILABLE TO USE WITH CUSTOMER TYPES CHECKED


Corporate: ☐ Individual: ☒ System Use: ☐ Business Account: ☒



Check the boxes that apply.

Customer types must be checked the same way you set SITE BUSINESS RULES. Review customer types on the SITE BUSINESS RULES page by clicking [here](#).

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Click  to add this new charge or discount.

Reporting of charges and discounts



WebSelfStorage enables you to review the effectiveness of your charges and discounts by providing a detail report of these items. You control the timeframe of this report as well as the item you want to review.

To view the
REPORT
selection page,
click on
REPORT on
the CHARGE
/DISCOUNT
ALLOCATION
MENU.

Charge/Discount Allocation Menu





Charges and Discounts



Report

Click On An Underlined Item To View


(Access Key: B)

An example of
the REPORT
SEARCH
INFORMATION
page.

Report Search Information	
STEP 1	YOUR ENTITY IS 990020
STEP 2	SELECT ONE  SAFESTOR \$10,000
STEP 3	INPUT A DATE RANGE From: 05 / 05 / 2000 To: 05 / 05 / 2000
STEP 4	GENERATE REPORT BY CLICKING ON FIND   (Access Keys: B) (Access Keys: F) 

SELECT ONE	
Choose	
	
EXTENDED ACCESS	
INTRODUCTORY DISCOUNT	
LOCK REMOVAL	
MAIL DELIVERY	
REFERRAL	
SAFESTOR \$10,000	
SAFESTOR \$15,000	
SAFESTOR \$5,000	
SALE ADVERTISING	
SECURITY DEPOSIT	
TEST	

To complete this page to retrieve information:

1. Click on the down-arrow under SELECT ONE.
2. Scroll the list until you find the charge or discount you want for this report.
3. Click on this charge or discount.

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INPUT A DATE RANGE

From: 9/2 / 97 / 2001 To: 9/2 / 97 / 2001

4. Type the *from* and *to* dates.

Note: The dates can be the same day, but the *from* date cannot be after the *to* date.

5. Click  to see the resulting report.

Report For Entity 990019			
Date: 1/1/2001-6/30/2001			
STATUS	DESCRIPTION	ROOMS	AMOUNT
PAID	SAFESTOR \$4,000	45	\$526.01
REVERSED	SAFESTOR \$4,000	8	(\$61.30)
NOT PAID	SAFESTOR \$4,000	12	\$137.00
Totals:		57	\$601.71

(Access Key: B)

The report shows the total number of rooms in three categories:

- PAID means the customers have paid for the charges.
- REVERSED means the customers asked to have charges removed from their bill.
- NOT PAID means that applied charges have not been paid.

Letter Maintenance

E-251

Letter Maintenance



From UHI
MANAGE-
MENT MENU,
click LETTER
MAIN-
TENANCE to
view and edit
letters.

Letters can be set up within this function and used by the application. The SITE BUSINESS RULES page controls what letters are used with what function. Creating and editing letters is done from the LETTER MAINTENANCE page.

UHI Management Menu

Audit Reports
Chg/Disc Allocations
Letter Maintenance
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Click On An Underlined Item To View

(Access Key: B)

Click on
LETTER
TEMPLATES
from the
LETTER
MAIN-
TENANCE
MENU.

Letter Maintenance

Letter Templates

Click On An Underlined Item To View

(Access Key: B)

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This is a text editing application. Start typing your letter in the larger box on the right. Whenever you need to include information from your database, such as an address, date, rate, room number, etc., scroll down the list on the left under the title FIELDS. Double-click on the field you want to show. The application adds this information to the letter at the cursor's position.

The letter can be as long as necessary. The scroll bar on the right provides you with a way to view all parts of the letter. If you need to correct something, simply move the mouse to that position and click.

Letter Template	
Fields	Letter Name: RATE CHANGE
AUCTION	<<EntityLabel>>
AuctionDate	Date: <<TodayDate>><div align=center>RATE
AuctionProcTot	CHANGE</div>
CUSTOMER	<<CustomerLabel>>
CustAddress	Dear <<CustomerName>>,
CustomerLabel	My staff and I would like to thank you for your continued patronage of U-Haul Self-Storage. In an effort to provide better security for you and your goods, we have upgraded your security system with new alarms and the installation of motion sensors. In addition to this, we recently painted the interior of the building. This improvement has
CustomerName	
DATE	
	YOU (Access Key: V)
	Double-Click The FIELD Needed To Move It To The Letter
	YOU
	Back Delete Save (Access Key: B) (Access Key: D) (Access Key: S)

Notice within the above letter there are items with double angle brackets around them. <<EntityLabel >> These tell the computer to replace the item with the information from your database. These are added by double-clicking on the item found in the list on the left.

interior of the building. This improvement has restored the appearance and structure of your storage building. As always please bring any other maintenance concerns to our attention the next time you are in so that we may attend to them.

In our effort to improve service to you, we have recently taken advantage of several computer upgrades which now enable us to send you a monthly invoice as a convenient reminder before your rent is due. We can also accept a delivery for you in your absence. There is a nominal fee associated with these services to help defer costs. Please contact me directly for more information, or to sign up for one of these new value-added services.

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me directly for more information, or to sign up for one of these new value-added services.

We are committed to providing you and your belongings with a better and better product. We believe that this creates more value for you, our customer. Effective <<NewRateEffDate>>, your monthly base rent for storage room #<<RmNumber>> is being changed to <<NewRoomRate>>. The total for your next payment will be <<NextMonNewBal>>.

If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul.

Whenever a letter is generated, the application replaces the double angle bracket areas with the corresponding information from the database.

believe that this creates more value for you, our customer. Effective <<NewRateEffDate>>, your monthly base rent for storage room #<<RmNumber>> is being changed to <<NewRoomRate>>. The total for your next payment will be <<NextMonNewBal>>.

If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul.

Sincerely,

Howard Chase
General Manager
<<EntityName>>



Click [here](#) to review information about the different letter template elements.

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Viewing a letter



Here is an example of the final letter. You can view letters as you create them by clicking

right below the letter writing area on the LETTER TEMPLATES page.

To return to the LETTER TEMPLATES page, click



Letter Preview

Date: 6/18/2001

RATE CHANGE

Dear ,

My staff and I would like to thank you for your continued patronage of U-Haul Self-Storage. In an effort to provide better security for you and your goods, we have upgraded your security system with new alarms and the installation of motion sensors. In addition to this, we recently painted the interior of the building. This improvement has restored the appearance and structure of your storage building. As always please bring any other maintenance concerns to our attention the next time you are in so that we may attend to them.

In our effort to improve service to you, we have recently taken advantage of several computer upgrades which now enable us to send you a monthly invoice as a convenient reminder before your rent is due. We can also accept a delivery for you in your absence. There is a nominal fee associated with these services to help defer costs. Please contact me directly for more information, or to sign up for one of these new value-added services.

We are committed to providing you and your belongings with a better and better product. We believe that this creates more value for you, our customer. Effective 12/30/1899, your monthly base rent for storage room # is being changed to 0. The total for your next payment will be 0.


If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul

Sincerely,

Howard Chase
General Manager

(Access Key: B)

Click  to save the letter and return to the LETTER MAINTENANCE MENU.

Editing a letter



As you add letters, the LETTER MAINTENANCE MENU page grows, displaying all active letters. To edit an existing letter, double click on the letter's name.

E-256

Maintaining rates



Rental rates are sometimes governed by the economy. If you have enormous competition from other storage facilities in your area, you may want to lower your rates to attract customers away from these competitors. If demand for storage rooms rise, you may want to increase your rates. In additions, you may increase rates because of improvements made to the facility. There are many reasons why a rate changes. Because rental rates are fluid, you need a feature that provides the flexibility to change rates as needed.

To get to the
RATES MENU
from the HOME
PAGE, click on
UHI
MANAGEMENT
MENU. On the
UHI
MANAGEMENT
MENU, click on
RATES.

Rates Menu

Set New Rates Final Approval

Click An Underlined Title To View



(Access Key: B)

Setting new rates

Click on SET
NEW RATES
on the RATES
MENU page
displays the
FACILITY
UTILIZATION
page.

Facility Utilization For Entity 990020 By Sizecode																
Facility Utilization:					New Rates					Rate Change Reason						
Size	Sqft Rm	# Rms	Occ Var	% Occ	Curr Rate	Old Rate	Curr Patl Inc	Old Patl Inc	Curr\$ per Sqft	Old\$ per Sqft	Curr Occ Inc	Old Occ Inc	Old % Chg	Old Inc Chg		
\$ 4X4X5 11 CL1	16	2	0	2	0.00%	\$24.95	\$0.00	\$49.90	\$0.00	\$1.56	\$0.00	\$0.00	\$0.00	0.00%		
\$ 4X4X5 11 CL1	32	0	0	0	0.00%	\$42.95	\$0.00	\$0.00	\$0.00	\$1.34	\$0.00	\$0.00	\$0.00	0.00%		
\$ 5X5X7 21 CL1	25	0	0	0	0.00%	\$44.95	\$0.00	\$0.00	\$0.00	\$1.80	\$0.00	\$0.00	\$0.00	0.00%		
\$ 5X5X7 11 CL1	64	2	1	1	50.00%	\$34.95	\$0.00	\$69.90	\$0.00	\$0.55	\$0.00	\$34.95	\$0.00	0.00%		
\$ 5X10X7 11 CL1	80	4	0	4	0.00%	\$44.95	\$0.00	\$179.80	\$0.00	\$0.56	\$0.00	\$0.00	\$0.00	0.00%		
Summary:					217	8	1	7	\$192.76	\$0.00	\$299.60	\$0.00	\$5.81	\$0.00	\$34.95	\$0.00

\$ = View Rate History For Sizecode



(Access Key: B)




The FACILITY UTILIZATION page provides you with the following information:

- Different sizecodes associated with your business.
- Square feet for each sizecode.
- Total number of rooms associated with each sizecode.

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Within the
REPORT
LIST, there is
an
EXPECTED
MOVE OUT
REPORT. This
lists all
customers who
have filled in
the given a
VACATE
DATE on the
contract.

Expected Move Out Report					
Entry: 990828			Date: 6/1/2001		
CUSTOMER NAME	ADDRESS	CITY, STATE	PHONE #	RM	BAL
10/1/2001					
SMITH, FRANKLIN	1922 N. 44TH STREET	TEMPE, AZ	(480)398-2938	107	\$0.00
<div style="text-align: center;">  (Access Key: B) </div>					



You can use this report to see how soon a customer plans on vacating an occupied room. You can also use this report to periodically check with your customers to determine if the vacate date is still accurate. All customers' phone numbers are included on this report.

With this information, you can tell prospective renters when a room is expected to be available. Using this information, you potentially can move a new customer in the same day that an old customer is moving out.

Updating reservation rules



Two reservations types can be created within this application.

- A QUOTE is a non-guaranteed contract that provides the customer with the current rate on a particular sizecode. It does not guarantee that a room of this sizecode will be available if the customer decided to rent. No deposit is taken, and the quote remains active for only a short time.
- A CONFIRM is a guaranteed contract that provides the customer with the current rate on a particular sizecode. The customer is guaranteed a room. If a room of this sizecode is not available, the customer is guaranteed a room of a different size. If the room is larger, no additional fee is charge on the first month's rent. If the room is smaller, a refund is provided the customer. A CONFIRM reservation requires collection of a deposit.

Reservation rules control much of the above information.

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How many days after expected move in do you want a reservation to no show?



Reservations require an expected move in date from the customer. If the customer does not return, you do not want the reservation to remain in limbo forever. In order to control reservations that are never used, the rule shown above provide the application with a timeframe for retaining CONFIRM reservations.

In the above example, a reservation no shows two days after the expected move in date. If a customer has an expected move in date of June 1st, but does not return by the end of the business day on June 3rd, the reservation no shows.

No shows are created during the closing process.

There is a report available of all no shows in the REPORT LIST.

How many days in the future will you allow a reservation to be made?



Enter a future-day limit for reservations. For example, you may not want to take reservations six months in advance. The 30, in the above example, indicates that reservation cannot be taken beyond thirty days (a month) in advance of today's date.

What reservation-confirmation letter is used?

RESERVATION LETTER



When a reservation is made remotely, once the reservation is directed to your center, a reservation-confirmation letter is created. This notifies you that a reservation was made. It also provides a letter you mail to the customer notifying them that you are aware of the reservation.

To assign a letter to a rule:

1. Click on the down-arrow in the list box.
2. Scroll the list until you find the letter you want to assign.
3. Click on the letter.



Note: Letters are created from another page within UHI MANAGEMENT MENU, click [here](#) to see how to set up letters.

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Maintaining Sizecodes








Sizecodes are used to describe and control the different aspects of room inventory.



To access the SIZECODE LIST page:

1. Click on UHI MANAGEMENT from the HOME page.
2. Click on SIZECODES from the UHI MANAGEMENT MENU page.

The
SIZECODE
LIST page
provides you
with a list of all
sizecodes
established at
your facility.

Sizecode List For Entity 002510							
SIZE	PROD.	DESCRIPTION		DOOR	BONUS	#RMS	RATE
 5X5X8	CRATE	1 COVERED	NOCLIMATE	SWING		4	\$24.95
 5X5X8	SC-10	1 LOWER	CLIMATE	SWING		0	\$24.95
 5X5X8	SC-10	1 LOWER	CLIMATE	SWING		0	\$34.95
 5X5X10	SC-10	1 LOWER	CLIMATE	SWING		0	\$25.95
 5X8X5	LOCKERS	1 COVERED	NOCLIMATE	SWING		0	\$34.95

 = Edit The Sizecode  = Toggle Switch To Activate Or Deactivate A Sizecode

 (Access Key: B)  (Access Key: A)

Editing a sizecode



Sizecodes seldom are changed once established. On the outside chance that a sizecode change needs to be made, an editing feature is provided.



To edit an existing sizecode:

1. Click on the picture frame icon  next to the sizecode you want to edit.